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NEWSPAPER

Advertising Age

January 29, 1990

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Crain's International Newspaper of Marketing · In Two Sections · Section 1 · $2.00 a copy

Continental grounds Ayer

Contenders for $50M account may include JWT, Scali, WRG

By Jennifer Lawrence

HOUSTON—Continental Airlines late last week fired N W Ayer as agency of record on its estimated $50 million account.

James O'Donnell, the airline's senior VP-marketing, confirmed Ayer had been given 90 days' notice. The agency serviced the account from New York and Houston.

The Texas Air Corp. subsidiary this week is expected to invite a handful of agencies to pitch the business, with a selection possibly by March 1, Mr. O'Donnell said.

He declined to reveal the prospective shops, but sources familiar with the company named New York agencies J. Walter Thompson USA; Scali, McCabe, Sloves; and Wells, Rich, Greene as leading contenders. D'Arcy Masius Benton & Bowles also may be involved.

"We concluded that it was time for a change," Mr. O'Donnell responded, when asked why Continental fired the agency.

"The decision to part company with a fine agency like Ayer was extremely difficult," he said. "During our three-year relationship, Ayer did a substantial amount of good work for us. But in the end, we decided that it was not a good fit."

The air carrier's account had been troubled by an ongoing turnover of senior agency executives. Insiders speculated that the ad agency's mistake was failing to put a stable account management team in place—particularly for an airline whose business demands marketing decisions

(Continued on Page 8)

Joe Montana invites Coke's celebrities to take a taste test.

Ad 'hype clutter' crowds out game

By Patricia Winters

Commercial "hype" is beginning to overtake the message.

What some are calling "hype clutter"—the publicity barrage surrounding advertising even before it hits the air—reached its zenith at yesterday's Super Bowl.

No longer just professional football's championship game, the Super Bowl has become a "commercial championship" among advertisers, with an ad buildup resembling that for the game itself.

While the idea of ads generating news isn't entirely new, never before has it reached such a crescendo.

"What's happening is that there are now two Super Bowls: the Super Bowl on the field and the Super Bowl of commercials," said Larry Kurlander, senior VP, American Express Travel Related Services Co.

AmEx departed from its publicity-shy stance this year by pre-announcing the airing of its spot with actor Paul Newman (*see story on Page 2*).

The strategy of leveraging interest in commercials into more airtime is now part of many marketers' game plans, including McDonald's Corp., Anheuser-Busch and Gillette Co., all of which ran spots on the Super Bowl and hyped them beforehand.

■ An *Ad Age* study looks at how many free plugs for products run on network TV in one 24-hour period—Page 6.

Some marketers, such as Pepsi-Cola

(Continued on Page 58)

Obstacles mount for 'healthy foods'

An Advertising Age roundup

There's near chaos in the healthful foods marketplace.

From oat bran to rice bran to health "seals," companies that had counted on this trend carrying them into the 1990s are suddenly finding it extremely rough going. Roadblocks are appearing everywhere.

Just as the American Heart Association and participating food marketers were to kick off the HeartGuide labeling program this week, the Food & Drug Administration warned that participants were "risking regulatory action."

Just as Kellogg Co. disclosed the $30 million-to-$35 million introduction of Kenmei Rice Bran cereal, a Rice Council of America-funded study, expected to show cholesterol-lowering benefits for rice bran, didn't.

Just as that study came out, a second report questioning oat bran—this one co-sponsored by Quaker Oats Co.—was released.

Quaker turned around and produced a page newspaper ad that listed the 27 years' worth of health studies that *did* show cholesterol-lowering benefits for oat bran. It ran Friday in *USA Today*, *The Wall Street Journal* and five other major dailies.

Kellogg's Kenmei cereal will enter the rice bran arena in March.

The most chaotic situation is with the heart association's HeartGuide program, set to be launched today in supermarkets nationwide.

"To make a statement a week before the program is out is grossly unfair on the part of the FDA," said Bob Harris, president of GFA Brands, whose Heart Beat canola oil and Heart Beat margarines will carry the HeartGuide seal.

"The American Heart Association is like

(Continued on Page 58)

LAST MINUTE NEWS

Riney sale rumors fly

SAN FRANCISCO—Hal Riney & Partners' postponement of an annual fiscal meeting for staff has fueled rumors that announcement of a sale or the sale of an equity stake is imminent. One source said Mr. Riney has negotiated a partial buy-in involving a London agency. Mr. Riney repeatedly has denied rumors he's seeking to sell the agency; his office last week said he's out of town. "We're not now in any discussion with anybody for the sale of this company," said Jim Travis, Riney president-chief operating officer, who is based in New York. Asked about a possible minority investment, he said, "we don't need anything like that; there's no reason for it. Things are going too well."

Henkel mulls HDM ties

BARCELONA—West German detergent giant Henkel will decide this week whether to pull its $11 million account from HDM here. Henkel's decision also could affect the marketer's European relationship with the agency. HDM has about a quarter of Henkel's estimated $175 million European account. Henkel's possible move follows turmoil at the agency that led to the departure of three executives here.

Ky. ad tax in trouble

FRANKFORT, Ky.—A source close to Gov. Wallace Wilkinson last week acknowledged legislative support for the

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INSIDE

Kids are hot ..... P. 3
Magazines rush to copy *Sports Illustrated for Kids*.

Making faces ..... P. 12
New research technique at BBDO explores consumers' emotional feelings about ads.

Wanted: Agencies ..... P. 54
The U.S. Marine Corps is trying to drum up some agency interest in its account review.

Lintas to handle Diet Coke globally

By Patricia Winters and Jon Lafayette

Coca-Cola Co., after using McCann-Erickson Worldwide as its sole international agency network for decades, is establishing Lintas Worldwide as a second global network for the rapidly expanding Diet Coke brand.

Lintas will assume the worldwide creative assignment for Diet Coke, Coca-Cola Co. said. The agency has handled those duties in the U.S. and Canada since the brand's introduction in 1982.

Lintas and McCann are both units of Interpublic Group of Cos.

European Community countries will start switching to local Lintas offices this year, with other international markets switching after 1990.

Diet Coke, known as Coca-Cola Light in some countries, is now marketed in 80 nations. Annual spending outside North America is estimated at $50 million.

The company said the switch

■ Lintas brings its European buying service to Canada—Page 55.

isn't a reflection on McCann's creative abilities, which Coca-Cola Co. called "superlative."

Instead, the move reflects the expansion of Diet Coke, which grew 38% in annual worldwide sales volume over the past three years, the company said. The brand has grown so large it needs an agency dedicated to the brand globally, a Coca-Cola Co. spokesman said.

McCann keeps Coca-Cola Classic, marketed in 160 countries, and also retains the company's international "flavor" business, including Sprite and Fanta.

For now, McCann will keep media buying for Diet Coke outside North America.

"Diet Coke is becoming a major worldwide brand," said Lintas Chairman William Weithas. "The Coca-Cola people, in order to make sure that this potential is realized, want to have a separate system from McCann-Erickson working on it full time."

Lintas has set up an international Diet Coke team in New York headed by Exec VP-Client Services Robert Wadsworth and Executive Creative Director Roger Mosconi, who joined Lintas last September from Pepsi agency BBDO Worldwide. □

AmEx begins TV 'Portraits' with Newman

By Judith Graham

Paul Newman's endorsement career starts with a whimsical spot for American Express.

American Express Co. brought its famous "Portraits" print campaign to TV during the Super Bowl in a humorous new commercial featuring Paul Newman.

A second video portrait featuring actress Meryl Streep is scheduled to run soon, capping AmEx's coup of snaring both Mr. Newman and Ms. Streep. The spots represent their debut appearances in commercial advertising (AA, Dec. 11).

The TV version of "Portraits" will become a new component of AmEx's corporate advertising, along with the continuing print campaign and the ongoing "cardmember stories" TV spots dramatizing the benefits of AmEx's credit cards. Ogilvy & Mather, New York, handles the efforts.

The Newman spot spoofs one of Mr. Newman's favorite hobbies: auto racing.

It opens with the superstar preparing for a race with great seriousness, donning gloves and helmet as the crowning touches to his high-tech outfit.

His vehicle? A miniature motorcycle.

Mr. Newman doesn't say a word in the spot, and there's no product mention until the final b&w frame that reads, "Paul Newman. Cardmember since 1966."

The Paul Newman spot "shows you can use a celebrity in a very artistic but powerful way for a product without a hint of exploitation," said Kenneth Chenault, president of AmEx Travel Related Services Co.'s Consumer Card Group.

Jerimiah Chechik and Lisa Pugliese, both of the Artists Company, were director and producer, respectively; Jan Kiesser, served as director of photography. The creative team at O&M: Gordon Bowen, creative director; Kevin Kelly, writer/producer; Tom Pratt, art director; and Karl Westman, music producer.

Unlike the print campaign, shot exclusively by photographer Annie Leibovitz, the artistic teams behind the video portraits will vary, Mr. Bowen said.

The idea behind the spot was Mr. Newman's own, Mr. Bowen said, inspired by a tiny but surprisingly fast cycle he keeps in his Westport, Conn., garage.

Negotiations for upcoming TV spots are under way with several well-known personalities, but so far Ms. Streep is the only one to have signed. □

Chrysler sets Olympic deal

By Wayne Walley and Raymond Serafin

Chrysler Corp. closed the first Winter Olympics ad deal with CBS last week, agreeing to buy a combined $106 million in commercial time for the 1992 and 1994 Games.

CBS said the agreement gives Chrysler half the time allotted for automotive commercials within the network's Olympic telecasts on a non-exclusive basis, without ratings guarantees.

Exclusivity has become a priority for automakers, particularly General Motors Corp., when making media buys. But the premium price usually associated with Olympics exclusivity might have been too steep for any single automaker to pay.

By agreeing to pick up half the automotive inventory, Chrysler essentially guarantees itself at least equal prominence in the Winter Olympics without paying a premium.

The lack of ratings guarantees could be a gamble for Chrysler, but CBS may have insisted on those terms to avoid the make-good problems previously suffered by both ABC and NBC.

Ratings shortfalls caused both those networks to lose millions in revenue and ultimately lose money on Olympics telecasts in 1988.

Without offering comment on the lack of exclusivity or a ratings guarantee, Chrysler executives praised the deal.

"It was an excellent advertising buy," said Arthur Kesteloot, manager of advertising and media relations. "It made sense to lock in the time and the rate."

Mr. Kesteloot would neither confirm the cost nor discuss specifics of the buy, such as the number of spots per telecast.

The Chrysler buy totals $50 million in time for the 1992 Games in Albertville, France, and $56 million in time for the 1994 Games in Lillehammer, Norway, sources say.

Mr. Kesteloot said Chrysler will use the time to "showcase a wide range of completely new products that will be introduced during that time."

CBS had intended to start

(Continued on Page 58)

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Vol. 61, No. 5—ADVERTISING AGE (ISSN 0001-8899) is published weekly by Crain Communications Inc. at 740 Rush Street, Chicago, Ill. 60611-2590. Second-class postage paid at Chicago and additional mailing offices. Send address changes to ADVERTISING AGE, Circulation Department, 965 E. Jefferson, Detroit, Mich. 48207. $2.00 a copy, $76 a year, $127 two years. Add $128 per year for air delivery to Europe & Middle East. Add $54 for surface mail to all other foreign countries. WILLIAM STRONG, VP-circulation; DAVE KELLEY, circulation manager. Four weeks' notice required for change of address. Address all subscription correspondence to Circulation Department, Advertising Age, 965 E. Jefferson, Detroit, Mich. 48207 1-800-968-9970. Microfilm copies are available from University Microfilms, 300 N. Zeeb Rd., Ann Arbor, Mich. 48103. Microfiche copies are available from Bell & Howell, Micro Photo Division, Old Mansfield Rd., Wooster, Ohio 44691. AD AGE is available for electronic retrieval on the NEXIS® Service, Mead Data Central, Inc., P.O. Box 933, Dayton, Ohio 45402 (800 227-4908).

Free 'plugs' supply ad power

From news shows to soaps, marketers get mentions on TV

By Scott Hume

Film critic Gene Siskel followed his review of "The Little Mermaid" Dec. 19 on the "CBS Morning News" with the observation that his daughter immediately wanted to go to McDonald's and get a "Little Mermaid" Happy Meal.

That was a plug for McDonald's Corp., a free mention for an advertiser that spends $250 million annually on network TV advertising.

TV programming is constantly interrupted by paid ads, but increasingly, the programs themselves are also peppered with what really are unpaid ads: mentions of products by talk show guests, corporate logos superimposed behind newscasters' heads to illustrate a news story, signage or labels visible during dramas.

According to a study commissioned by *Advertising Age*, brand names get a significant amount of visibility free, through regular TV programming, compared with what they get through paid advertising.

To find out how many plugs occur during the average broadcast day, *Ad Age* joined with the Department of Advertising at Northwestern University's Medill School of Journalism.

A complete 24-hour broadcast day for each of the Big 3 TV networks was videotaped, one network a day for three consecutive days.

Those tapes were then viewed by 28 graduate students—with at least two students viewing each tape—who watched for and recorded every plug they believed they heard or saw.

The definition of a plug used was purposely broad and subjective. Basically, any mention of or appearance by a commercial product or company was counted as long as it was not judged to be a paid placement.

The subjectivity was factored in because *Ad Age* wanted to learn how many product names and logos a group of college-age people would spot.

When director Ron Howard mentioned on "The Arsenio Hall Show" that he lives in a Winnebago on the movie set, that counted as a plug for the motor home company.

When an actor on "General Hospital" bought an ice cream cone from a street vendor and the Drumsticks label was clearly visible, that counted. So did the ad for Marlboro 25's visible in the magazine another character on that show leafed through.

If the students thought the watch on a person's wrist clearly looked to be a Rolex, even if the name wasn't visible, or if someone in a program was wearing Levi's jeans, those appearances counted.

Prizes on game shows didn't count. Brand names or products that students differed in identifying also were weeded out.

In a single day of programming on the three major networks, this study found 818 instances of a recognizable product or mention of a brand or corporate name.

News programs No. 1 in plugs

News programs led the pack when it came to including such plugs, accounting for 44% of the brand-name inclusions.

Next were the talk/variety shows (accounting for 14.5% of the total).

For example, comedian Rich Hall's routine on NBC's "Late Night With David Letterman" included mentions of Exxon, Mickey's malt liquor, Milk-Bone dog biscuits, Milk Duds candy, Pop Tarts, Safeway stores and the *Village Voice*, as well as Mr. Hall's series of "Sniglets" books.

All plugs.

But the record was set earlier in the evening by comic Jay Leno, the guest host of NBC's "Tonight Show Starring Johnny Carson." Mr. Leno managed to include in his routine mentions of the "ABC Evening News With Peter Jennings," Adidas aftershave, Cycle 4 pet food, Eastern Airlines, 40-Plus Bran Flakes, the film "Friday the 13th, Part 7," Garfield plush toys, Mary Kay cosmetics, the board game Monopoly, Toyota, *USA Today* and more.

Consumers have been conditioned to recognize corporate and product logos, and most people from 3 to 50 own at least one article of clothing bearing a product name or logo.

So it doesn't take a trained eye to notice that the bad guys are wearing Reebok shoes during CBS' "Jake & the Fatman."

And during a late-night showing of an old episode of "Family Medical Center," most viewers probably noticed the Johnson & Johnson logo on products above the hospital patient's head.

Valuable, free advertising

In a culture and economy where few things are as valued as the brand name, each of those mentions constituted a valuable—and free—piece of advertising.

The argument also could be made that they undercut advertisers by increasing the clutter of brand names on the medium.

Plugs can be negative, too, and these were counted. It happened, for example, that most newscasts on one of the days carried a story about new data gained from the cockpit flight recorder from a Delta Air Lines crash earlier in the year. Each mention of Delta constituted a plug, though not necessarily a positive one.

The broadcasts for the three networks (taped Wednesday through Friday, Aug. 2 to 4, 1989) were regarded, in total, to represent the equivalent of a single network day.

Among the results of the study:

- The networks carried roughly an equal amount of plugs in their programming. The students counted 297 plugs over 24 hours on NBC's WMAQ-TV, 270 on CBS' WBBM-TV and 251 on ABC's WLS-TV. All three Chicago stations are owned and operated by their networks.
- Most free mentions of company and product names come during news programming.

WMAQ's 6 a.m "News at Sunrise" program included stories about possible buyers for Avon Products, trading activity by Drexel Burnham Lambert, the death of a woman when a train collided with the 1985 Mercury she was driving, an emergency landing made by a Piedmont Airlines pilot and a review of the film "Parenthood."

The sports segment on WBBM's 10 p.m. news program included a short item on the Boston Celtics' Larry Bird. The Nike logo was visible on players' shoes and so was the Adidas name on an onlooker's T-shirt.

- News/feature programs such as NBC's "Today" ranked third, with 14.3% of total plugs.

Some of these plugs were for the books or films or TV programs with which guests were associated. But not all. For example, a "Today" feature on Jackson Hole, Wyo., included mention of Miller beer and Calvin Klein jeans.

Brand names visible or mentioned in news stories aired during "CBS This Morning" included Coca-Cola, Corona and Miller beers, Ford, Heinz ketchup and NutraSweet.

- Daytime dramas also had their share of plugs. The Bell symbol was prominent on the phone booths used by characters on ABC's "All My Children" and "General Hospital." A character on CBS' "The Bold & the Beautiful" read *Elle* magazine. To signal the wealth of a character on NBC's "Another World," the camera zoomed in on his Rolex.

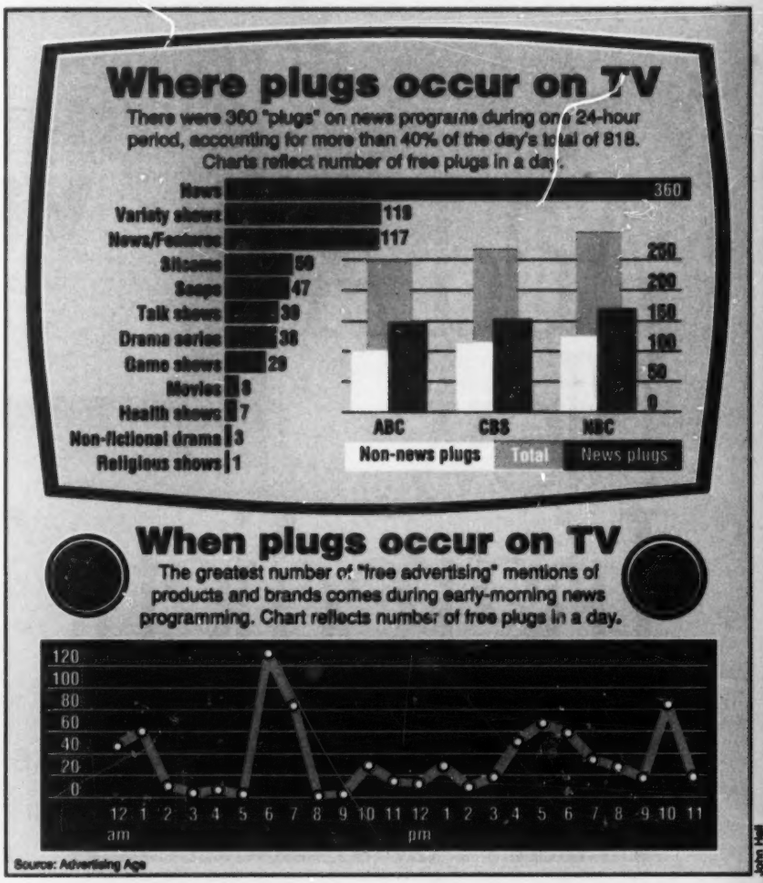
All three networks said their policy is to eliminate or at least minimize the number of plugs in programming.

ABC's policy states that "identification of products [or services] by brand name or the use of brand-name products as props should be kept to a minimum and must be specifically approved in each case by Broadcast Standards & Practices. Approval will be given only when the product reference or prop is important to sustaining the dramatic and production value of the program."

But dozens of plugs still manage to slip through this net, especially on news and variety programs where content can't be prescreened.

If there's a conclusion to be drawn from this study, it's one many of the students noted in their written evaluations: that product names confront us everywhere on TV, in programming perhaps more than through commercials.

Student Karen Davis wrote: "While I had always been aware that there were a good number of products appearing in today's TV programs, I did not realize the extent of the product appearances. . . . There is an almost blatant attempt to display the product names without hesitation." □



Students assist in plug count

CHICAGO—This study of plugs and "free advertising" was conducted with the assistance of Northwestern University's Medill School of Journalism, particularly Dean Don Schultz; Professor Martin Block, director of the graduate advertising division; and Instructor Beth E. Barnes, who shepherded the project to completion and provided an enormous amount of computerized tabulation.

These students in Medill's graduate advertising division monitored the 72 hours of videotape and logged their findings:

Anja Abeles, Tara Afnan, Bradley J. Bonewell, Sheri Brandwein, Rick Cooper, Karen Davis, Amy L. Engstrom, Marla Friedman, Saudia Gajadhar, Moshe Gaon, Brian Hutton, Junguk Hwang, Karen Koehn, Andy Larsen, Younghee Lee, Barry Levine, Carmen M. Lozada, Linda Neville, Pam Noe, Kimberly Oster, Puneet Pabi, Angela Pasqualucci, Kathy Rappel, Robert R. Sullivan, Carl Thompson, Donna Urbanowicz and Jeff Wasden.

The students were invited to record their observations about the project. Among them were the following:

"It seemed as if the producers and participants in 'USA Today on TV' went out of their way to name and show products. (Which makes sense, I guess. Heck, the entire 'USA Today' show can be considered a plug for that newspaper.)"—Andy Larsen.

"Many products get a free plug solely by conveying a stereotypical image of the user. Evian mineral water portrays 'yuppiedom' for example."—Barry Levine.

"I feel that having a character on a show use a product while 'in character' may be even more persuasive than a testimonial [ad]. I find it normal, and it appeals to me on a common-man level, that [the character] Michael on 'thirtysomething' would drink a certain beer. But I don't want to see a full-frame closeup on the can in his hand."—Amy L. Engstrom.

"Watching 'Young Wives Tale' (a 1951 film that aired late at night) and comparing it with current TV movies, the '50s sets were stark. The only visible product (in 'Young Wives Tale') was Lux detergent sitting next to the washer. Current sets have so many products, especially in the kitchen scenes."—Sandra Beck.

"I really do not believe that with the programs I saw there was enough blatant plugging of products going on to consider this to be an epidemic. I believe that shows on TV have a right to use any product in order to set up a more realistic situation."—Rick Cooper. □

Emotion guides BBDO's ad tests

By Gary Levin

NEW YORK—BBDO Worldwide has found emotions speak louder than words when it comes to measuring the effectiveness of advertising.

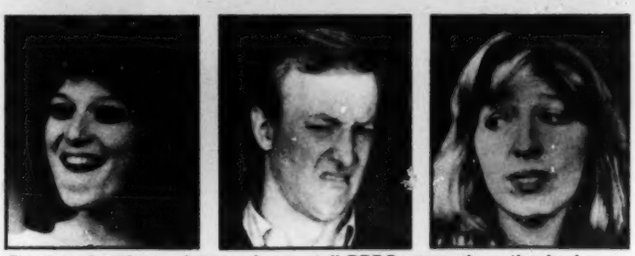
The agency has begun using the Emotional Measurement System, a proprietary device that uses photographs of actors' faces to help consumers choose their reactions to commercials.

The system has been three years in development. Under the leadership of Karen Olshan, senior VP-director of research services, BBDO has used the copy-testing system to measure the impact of commercials for Gillette Co.'s Atra Plus razors; Pepsi-Cola; Polaroid Corp.; and Wm. Wrigley Jr. Co.

BBDO said the process virtually eliminates the inherent bias in traditional copy testing. Under the traditional system, consumers often underestimate their emotional responses because they feel "silly" putting them into words, and words are subject to varied interpretations, the agency said.

"Traditional copy tests have failed to adequately measure emotional response," Ms. Olshan said. The techniques tend to measure thoughts rather than feelings. Other techniques that try to measure emotional response through physiological reactions, such as eye movements, also have met with little success, she said.

Rather than ask consumers to choose from a simple list or write in their own words, the agency devised a deck of 53 photos—narrowed from 1,800—representing what BBDO calls the universe of emotions. Each features one of six actors with different expressions ranging from happy/playful to disgusted/revolted. There are a total of 26 categories of emotions expressed.



By choosing these photos, viewers tell BBDO researchers they're happy, disgusted or unexcited about test commercials.

(BBDO's Photosort system, introduced in 1971, uses photos representing all types of people—rather than emotions—to help identify a brand's "user imagery.")

Here's how the system works: As with most copy testing, consumers are shown a single commercial or group of spots and are then given a questionnaire to test whether brand names and copy points are remembered. Researchers using the emotional measurement, inserted at any point during this process, provide the participant with the photos.

Each person is asked not to write or speak about the spot, but to quickly sort through the photos, setting aside any or all that reflect how he feels after viewing the commercial.

A researcher takes the selected cards and tabulates how often a particular photo is chosen by the 150 to 600 consumers who participate.

In the system, the expressions are plotted on a "perceptual map" to determine whether the response is positive or negative, active or passive. Agency researchers can then compare a spot's effect on, say, teens vs. adults or women vs. men.

"It doesn't tell whether [consumers will] buy one brand or another, but it can say whether it has generated the emotion you want it to," Ms. Olshan said.

BBDO tested the system on an Atra Plus razor campaign that began running in early 1989 with the theme, "The best a man can get." The agency wanted to see whether the male-targeted campaign would alienate women, but it found otherwise. Men were more likely than women to feel "proud and confident" after watching the spot, but more women than men felt "happy and joyful."

"Obviously, we would not air creative that would alienate women, but this actually showed strength among women greater than the strength [research had previously] shown," said Sharon Keith, VP-marketing research for Gillette's North Atlantic shaving and personal-care group.

Although the system wasn't used for Sensor ad development because of the "product-driven" nature of that campaign, it has influenced media selection, Ms. Keith said. Gillette will use more prime-time advertising and rely less heavily on male-skewed sports programming.

Gillette also expects to use the system on advertising for new men's toiletries products under development.

BBDO's creative department has given EMS a welcome reception.

"This stuff gets closer to the way advertising works," said Ted Sann, exec VP-executive creative director. He noted that its main advantage is to validate creative approaches and ensure that "we're pushing the right buttons."

The system can be used to show which age or demographic groups are more responsive to a spot and can thus help select media placement, but the findings won't lead to a decision to drop a campaign, he said.

"I see it less as a go/no-go thing than as a method of adjusting the advertising and maintaining it," Mr. Sann said.

Other clients are similarly—if tentatively—enthused.

"We've always known there's been an emotional component to advertising, but when you try to put it into measurable terms, it gets touchy-feely," said Ron Cox, group VP-marketing at Wrigley, which is believed to have tested its "Piece of America" image campaign using the system.

"Up until now we haven't had any real basis for feedback on whether [a commercial] did elicit a response on an emotional level," he said.

Mr. Cox called the new system "a large step forward" but said "there's a hell of a long distance" between measuring emotional response and manipulating it. □

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Pepsi tops Coke in '89 best-recalled ad ratings

By Scott Hume

Pepsi-Cola enters the 1990s with the best-recalled advertising of all consumer products.

Pepsi, which positions itself as "The choice of a new generation," was the choice of most consumers last year as far as ad recall is concerned.

Based on average recall scores for *Advertising Age's* monthly adWatch survey of top-of-mind awareness in 1989, Pepsi finished on top for the second straight year.

The recall bridesmaid last year, as in 1988, was rival Coca-Cola.

Sears, Roebuck & Co. and Toyota didn't finish in the top 10 in 1988 but made it in 1989. The California Raisin Advisory Board and political advertising were in the top 10 in 1988 but didn't repeat.

The two cola combatants also finished in the same order in the soft-drink category for the second year. Pepsi ads came to mind first by an average 37.5% of those polled when they were asked to name the first soft-drink advertising they recalled.

Coca-Cola had an average 31.6% share of first mentions in the category. Its extension, Diet Coke, which *Ad Age* recently named the "Brand of the Decade," finished in the No. 3 spot with 6.2% of first mentions.

Coca-Cola managed to spoil Pepsi's party a little bit, however, by finishing in the No. 1 spot in overall recall for the last month of 1989. In December, the top 10 in recall, in descending order, were Coca-Cola, Pepsi-Cola, General Motors Corp.'s Chevrolet, Anheuser-Busch's Budweiser/Bud Light, automobiles (in general), Miller Brewing Co., Ford, McDonald's Corp., Toyota and grocery stores (in general).

AdWatch is a joint project of *Ad Age* and the Gallup Organization. Awareness is measured monthly by asking a nationally projectable sample of adults to name the first advertising that comes to mind, overall and in several categories, from all seen

(Continued on Page 56)

AdWatch survey of advertising awareness Top 10 for 1989

Each month, 1,000 people were asked: Of all the advertising you have seen, heard or read in the past 30 days, which advertising first comes to mind? Rankings below are based on average recall over 12 months of 1989. Source: Gallup Organization, Lincoln, Neb.

Rank 1989	Rank 1988	Advertiser	Agency
1	1	Pepsi-Cola	BBDO Worldwide
2	2	Coca-Cola	McCann-Erickson Worldwide
3	3	McDonald's	Leo Burnett USA
4	8	Chevrolet	Lintas:Campbell-Ewald
5	7	Ford	J. Walter Thompson USA
6	5	Budweiser/Bud Light	D'Arcy Masius Benton & Bowles/-DDB Needham Worldwide
7	9	Miller	Leo Burnett USA/Backer Spielvogel Bates
8	—	Toyota	Saatchi & Saatchi DFS/Pacific
9	10	Tide	Saatchi & Saatchi Advertising
10	—	Sears	Ogilvy & Mather

SPECIAL REPORT

Retail Marketing

Edited by Adrienne Ward

It must be Tuesday S-2
Hours erratic but chain builds following.

No easy brush-off S-4
Dan Mathews is making the fur fly.

On the way up S-6
Where retail authorities expect growth.

International intriguing

As domestic sales lag, U.S. retailers probe foreign markets

By Pat Sloan and Judith Graham

As Talbots Inc. gets ready to open its doors for the first time in Tokyo next month, the retailer of classic American clothing is having to downsize. Japanese women are tiny compared with the average American woman, who measures in at size 12, so Talbots plans to carry only petite-size clothing in its Tokyo store.

Williams-Sonoma found itself in a similar size-related predicament. When the 118-store chain of gourmet cooking and serving equipment moved to Japan in 1988, it learned to carry only smaller cookware that fit smaller Japanese stoves.

It may be a small market size-wise, but Japan—like the rest of Asia and Europe—could provide big opportunities for U.S. retailers that have outgrown the market at home.

The general-merchandise segment of the U.S. retail industry is stagnant, according to Rosalind Wells, chief economist for the National Retail Merchants Association. Ms. Wells predicts growth will decline slightly in 1990 to about 5.9%, down from 6% in 1988 and 1989.

While much of the 1980s saw foreign retailers invade the U.S.—either buying up local retailers or importing retail formats such as Benetton and Ikea—U.S. retailers traditionally have been leery of international expansion. Those retailers most likely to consider expansion abroad are strong performers that have reached a saturation point in the U.S.

"[U.S.] retailers have been reluctant to look at anything beyond their own borders. But some of the newer breed are saying we shouldn't ignore these markets," says William Flatley, a consultant with Kurt Salmon Associates. "They realize . . . Europe is a new frontier. They see a movement internationally and they want to be a part of it."

> Retailers know "they better get their foot in the door before 1992 arrives."

Those retailers, he adds, also understand "they better get their foot in the door now, before 1992 arrives."

U.S. retailers have lagged foreign merchants in overseas investment. U.S. stores have invested $2.5 billion in Europe, compared with $5.5 billion committed to U.S. retailing by European investors, according to a 1988 study by the Harvard Business School and France's Hautes Etudes Commerciales-Institut Superieur Des Affairs.

But that is changing.

"In the last 18 months, names have begun popping up of [U.S.] companies thinking of expanding overseas," says Christin Cherry, a consultant with Nigel French Enterprises.

"I think [retailers] are beginning to realize [the U.S.] market is mature or maturing," says Walter Levy, a principal in the consultancy Walter K. Levy & Robert E. Kerson & Associates.

"And especially if you're an up-market retailer, regardless of what country you're in, you almost have to be global because there's a limited number of consumers [and markets] that can support an up-market store," Mr. Levy adds.

Upscale jeweler Tiffany & Co. is evidence of that.

"When we look at some of the remaining places in the U.S.—next year we're opening [in] Washington and Philadelphia—and then look at other countries around the world, their cities not only have the criteria [for new stores], but in some cases better criteria than cities remaining in the U.S," says Tom Andruskevich, senior VP-international and trade division at Tiffany.

Less tony retailers have reached similar conclusions.

Since last spring, J.C. Penney Co.'s Units wholly owned subsidiary has opened one store in Canada, three in the U.K. and six in Mexico, and is looking at other countries.

(Continued on Page S-2)

BAROMETER

Take a number

U.S. retail sales by category
(1988 figures in millions)

Category	1988	% change from '87
Automotive	$369.0	12.9%
Food	331.9	5.6
General merchandise	183.8	4.8
Eating & drinking	157.5	6.7
Gasoline stations	101.9	-1.2
Furniture	93.0	10.5
Lumber & hardware	88.9	14.0
Apparel & accessories	82.0	3.7
Drug stores	58.7	4.9
Other	162.4	11.6
Total	$1,629.2	7.8%

Source: Marketing Economics Guide/1989-90

Take the pulse

Can 1990 be any worse than '89 for the retail industry? Some outlooks are pretty dim; here are a few categories to watch.

TVs and VCRs . . . Manufacturers seem to have failed to realize most consumers already upgraded from black-and-white Sylvanias and basic Beta VCRs. Electronics retailers beware.

Home improvement . . . Bunker mentality is running rampant. Consumers increasingly want to come home from the office to a haven, not just four walls. Pier 1 and Crate & Barrel are on track.

Appliances . . . Microwave ovens aren't likely to fall victim to any bouts of "planned obsolescence." A slow housing market isn't helping either.

Apparel . . . Stung by the miniskirt debacle of 1987, marketers seem to have come to their senses, injecting a healthy caution about overly faddish fashion. The Limited and The Gap will stay leaders of the pack.

Sporting goods . . . Golf and bowling are leading the couch potato crowd back into a more active lifestyle, but who needs to replace aluminum softball bats?

Born to shop?

Percent of consumers 18 and older surveyed who like to shop in their spare time.

City	1989 responses	% change from 1987/88
Milwaukee	59.3	+5.7%
Detroit	59.0	+12.6
Houston	57.0	+8.1
Chicago	56.8	+9.4
Kansas City	55.9	+8.1
New York	53.8	+12.5
San Francisco*	53.0	+3.3
Atlanta	52.4	+8.0
Salt Lake City	50.5	+9.1
Denver	50.4	+10.3

*Also includes Oakland and San Jose

Source: Impact Resources, MA'RT Consumer Intelligence System
Ad Age Graphic: Holly Segure/John Hall

PEOPLE TO WATCH

Mathews making the fur fly

Dan Mathews' talent lies in getting under the skin of U.S. furriers.

As special projects coordinator for People for the Ethical Treatment of Animals, Mr. Mathews, 25, is responsible for advertising and marketing the organization's doctrine.

"This year has been incredible," he said during a recent telephone interview from the set of "Hard Copy," which was preparing a segment on the anti-fur movement. "The high point came [on Dec. 29] when Antonovich, a big furrier in New York, filed for Chapter 11. . . . They're learning that fur is bad business—not only for animals but for people as well."

"This year has been incredible," says PETA's Dan Mathews.

Not everyone agrees with Mr. Mathews' gospel, especially furriers.

"According to PETA, people shouldn't even wear wool or silk—because it harms worms—or duck down," says Tom Riley, VP at the Fur Council of America. "I consider this extreme."

Mr. Riley says the fur industry has had to counter the animal rights movement with advertising designed to convince people that everyone has the right to choose.

> "People have an image of PETA as dry, bleeding hearts with a chip on our shoulder."

For example, furriers in Minneapolis-St. Paul this month broke an outdoor campaign that read: "Fur. Leather. Wool. Meat. You have a right to choose." The theme was adapted from a newspaper effort created by the Fur Council.

PETA's most recent ads have focused on igniting peer pressure rather than on the "agony of animals." One ad, which ran in *Interview* and *Details*, featured a fur-clad model under the heading "What disgraces a legend most?" It was created free of charge by Luke Sullivan, now a copywriter at Fallon McElligott, Minneapolis.

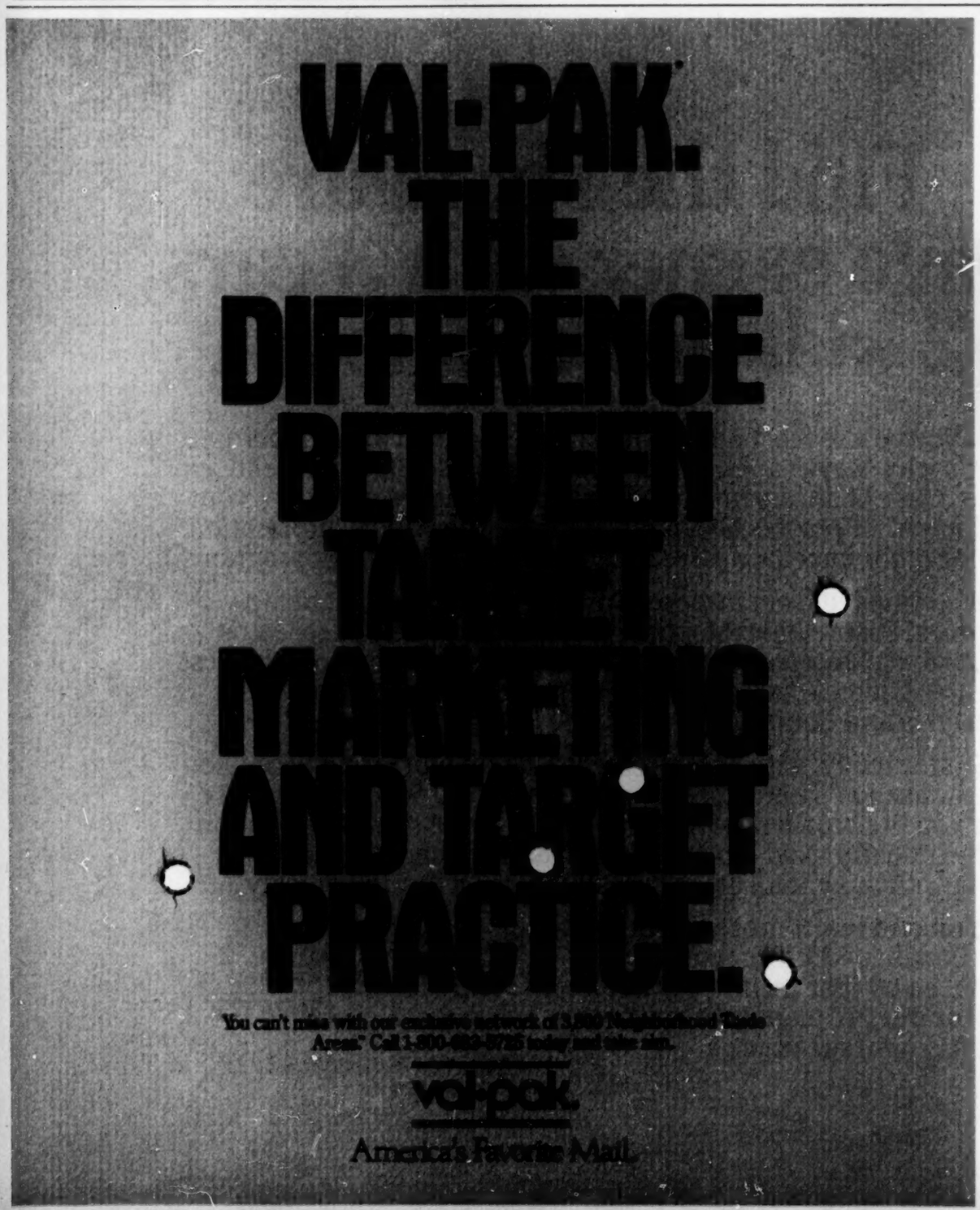
Mr. Mathews' biggest challenge this year is to keep up the movement's momentum.

PETA has scheduled a Rock Against Fur concert March 28 in New York, the last day of the International Fur Fair, and is coming out with an album titled "Tame Yourself," which contains original songs by top artists that deal with animal rights. It has even recruited Tony LaRussa, Oakland Athletes manager and a vegetarian, to lead a protest at the Seattle Fur Exchange Jan. 28 to Feb. 2.

Plans also include a new ad featuring "Saturday Night Live" regular Terry Sweeney as Nancy Reagan wearing a fur coat under the heading: "Fake people wear real fur." The ad was created by PETA and Schroffel & Associates, Los Angeles.

"People have an image of us as dry, bleeding hearts with a chip on our shoulder," Mr. Mathews says. "We're trying to prove we have a sense of humor."

—Adrienne Ward



MEDIAWORKS

YEAREND AD RESULTS

Titles post record year despite slow December

Consumer magazines carried a record number of ad pages in 1989 in spite of a weak December, Publishers Information Bureau figures show.

Total magazine ad pages for December were 15,184, down 1.7% from December 1988. Still, ad pages for the full year totaled a record 177,007, a 3.5% increase.

The soft December figures appeared worse because of a stronger-than-usual December performance in 1988, said James Guthrie, exec VP-marketing development at the Magazine Publishers of America.

But December 1989 also was marred by a 12.2% drop in automotive ad category revenues to $69.1 million. Advertising in the cigarettes/tobacco category fell 9.9% to $30.1 million.

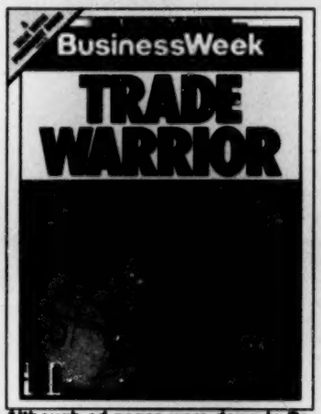
For the year, automotive revenues were up 10.4% to $882.9 million, and tobacco spending rose 13.3% to $401.5 million.

Women's service magazines were hit hardest by December's falloff. *Family Circle's* ad pages slid 25.8% to 121.84, *Better Homes & Gardens'* count dropped 20.6% to 115.93 and *McCall's* saw pages fall 25% to 86.3.

Other magazines hurt by the December drop include *Business Week* (421.78 pages, down 4.6%), *People* (413.41 pages, down 7.2%), *Architectural Digest* (137.12 pages, down 11.1%), *Reader's Digest* (95.83 pages, down 30%) and *Endless Vacation* (33.24 pages, down 60.7%).

Even those feeling the December heat participated in the record-setting last year, however.

Business Week again led all magazines tracked by PIB. The weekly carried 4,914.15 ad pages for the year, up 7.1%. Business magazines overall enjoyed a strong year, with the three leading titles in the category also claiming the top three positions among all magazines.



Although ad pages were down in December, *Business Week* still led all magazines in ad pages in 1989.

Forbes finished the year with 3,905.84 ad pages, a 12.9% gain. Rival *Fortune* boasted a 16.6% increase to 3,775 ad pages. *Entrepreneur* led second-tier business books with 1,758.47 ad pages, a 38.3% increase.

At least three magazines in the top 10 finished 1989 on a sour note. Time Warner's *People*, No. 2 in ad pages in 1988, finished fourth as ad pages fell 1.4% to 3,770.81. *TV Guide*, third in 1988, saw ad pages fall 7.2% to 3,255.13 as it sank to seventh. And *Vogue's* pages dipped 0.3% to 3,321.86 as the magazine fell to sixth from fifth.

The newsweeklies were led by *Time's* 2,733.86 ad pages, a 9.1% increase. *U.S. News & World Report* carried 2,053.17 ad pages, a 9.6% jump, and had been on track for stronger gains before its ad pages fell 5% in December to 205.2. *Newsweek's* ad pages rose 0.7% to 2,495.29.

Strong performances also were turned in by the women's service category. *Family Circle* led the so-called "Seven Sisters" with 2,018.81 ad pages, an 8.8% increase. *Woman's Day* carried 1,790.38 pages, a 6.2% jump; *Good Housekeeping's* pages rose 5% to 1,702.03; and *Ladies' Home Journal* posted an increase of 18.3% to 1,616.16 pages.

Better Homes & Gardens was the only "Sister" down in ad pages for the year. The Meredith Corp. title's pages dipped 2.8% to 1,428.68. Rounding out the list, *Redbook* ran 1,250.80 pages, up 3.1%, and *McCall's* carried 1,121.18 pages, up 8.3%.

Sports Illustrated was flat with 2,981.90 ad pages, a 0.1% increase, but still led all sports titles by a considerable margin. *Sporting News* saw modest gains, with pages rising 1.4% to 586.76. *Sport*, meanwhile, also was flat with 426.67 ad pages, a 0.5% hike.

American Express Publishing Corp.'s *Travel & Leisure* continued to dominate the travel field despite heated competition. *T&L* carried 1,516.23 ad pages, up 7.3%. *Conde Nast Traveler* finished a distant second with 960.35 pages, a whopping 52.7% jump.

Endless Vacation finished the year down 7% with 332.21 pages. *Travel/Holiday* had 409.8 pages, up 8.4%, while *National Geographic Traveler* carried 191.48 pages, up 32.5%.

A handful of strong young magazines continued to post impressive gains. *Premiere* carried 759.25 ad pages, up 28.7%; *Victoria's* pages rose 145% to 417.95; *Lear's* was up 81.4% to 649.97 pages; and *Longevity* carried 301.33 ad pages, a gain of 682.7%. □

Written by Scott Donaton.

Magazine ad-page leaders

Publishers Information Bureau figures for 1989.

Rank	Magazine	Pages	% chg	Dollars	% chg
1	Business Week	4,914.15	7.1	280,575,042	14.6
2	Forbes	3,905.84	12.9	157,896,948	22.5
3	Fortune	3,775.00	16.6	167,284,539	21.7
4	People	3,770.81	(1.4)	326,203,199	6.8
5	Bride's	3,368.86	17.2	85,280,547	26.3
6	Vogue	3,321.86	(0.3)	101,001,807	15.4
7	TV Guide	3,255.13	(7.2)	322,985,823	(3.7)
8	New York Magazine	3,094.86	1.4	47,430,625	7.5
9	Sports Illustrated	2,981.90	0.1	336,671,529	4.0
10	Time	2,733.86	9.1	373,395,017	6.9
11	Newsweek	2,495.29	0.7	255,918,694	5.9
12	Modern Bride	2,491.71	14.7	38,456,726	24.0
13	The New Yorker	2,409.51	5.1	84,033,158	13.0
14	Economist	2,366.00	0.6	18,282,571	11.8
15	Cosmopolitan	2,362.25	(0.4)	125,711,842	9.7
16	Elle	2,321.53	4.8	62,648,418	13.1
17	GQ	2,231.04	2.5	49,899,443	13.2
18	U.S. News & World Report	2,053.17	9.6	152,843,252	19.3
19	Family Circle	2,018.81	8.8	152,208,884	13.3
20	Rolling Stone	1,984.79	6.3	71,093,073	14.5
21	Glamour	1,959.53	(4.7)	88,833,183	2.1
22	American Way	1,896.71	5.9	20,720,567	14.4
23	Architectural Digest	1,862.32	2.7	48,049,915	9.2
24	Woman's Day	1,790.38	6.2	135,632,500	17.3
25	Entrepreneur	1,758.47	38.3	14,174,854	68.5
26	Good Housekeeping	1,702.03	5.0	148,033,344	14.5
27	Town & Country	1,665.58	(1.1)	36,280,310	12.7
28	Yachting	1,657.96	(3.2)	10,020,471	(0.8)
29	Mademoiselle	1,649.46	(8.1)	46,697,888	0.1
30	Ladies' Home Journal	1,616.16	18.3	104,742,667	25.0
31	Parents	1,544.02	7.9	60,344,516	13.6
32	W	1,531.03	6.9	31,141,307	15.9
33	Travel & Leisure	1,516.23	7.3	58,342,754	19.2
34	Muscle & Fitness	1,506.50	(3.3)	23,684,678	41.3
35	Sunset	1,503.31	(5.2)	44,372,483	(4.3)
36	Vanity Fair	1,467.42	24.7	41,616,840	51.1
37	Harper's Bazaar	1,454.78	0.7	35,958,923	10.4
38	Better Homes & Gardens	1,428.68	(2.8)	152,436,109	(0.2)
39	Texas Monthly	1,373.67	0.2	14,807,479	3.4
40	Skin Diver	1,362.22	(1.4)	12,056,492	2.1
41	Self	1,347.86	8.3	42,328,178	21.8
42	Golf Digest	1,338.07	5.3	63,995,011	15.8
43	Seventeen	1,331.70	(4.8)	39,590,128	2.4
44	Esquire	1,331.10	12.0	36,016,280	21.3
45	Southern Living	1,330.00	(9.9)	61,224,697	(0.7)
46	Gourmet	1,315.43	2.2	31,836,946	14.7
47	Money	1,313.44	(5.6)	79,668,330	(0.1)
48	Car & Driver	1,302.28	6.4	54,303,468	21.0
49	San Francisco Focus	1,298.32	2.4	7,796,184	8.8
50	Redbook	1,250.80	3.1	75,031,898	9.4
51	Inc.	1,231.46	(0.2)	46,642,257	10.5
52	Road & Track	1,223.30	3.8	37,954,712	14.3
53	Metropolitan Home	1,220.31	15.1	36,858,896	23.3
54	Golf Magazine	1,159.86	19.6	32,796,183	21.0
55	Ebony	1,149.57	(4.2)	38,011,050	0.2
56	Working Woman	1,128.74	(0.3)	31,937,026	9.7
57	McCall's	1,121.18	8.3	74,798,589	19.5
58	Jet	1,118.59	(12.1)	17,899,816	(6.5)
59	Reader's Digest	1,110.27	(9.0)	113,644,537	(0.3)
60	Country Living	1,106.36	(1.3)	42,804,156	14.3
61	Popular Photography	1,101.29	13.3	25,479,713	14.0
62	Bicycling	1,101.01	(1.2)	13,032,578	19.4
63	Bon Appetit	1,053.67	(0.4)	31,005,538	9.2
64	Smithsonian	1,053.24	(1.5)	43,766,044	5.7
65	Hot Rod	1,050.69	(0.6)	23,053,390	14.5
66	Ski	1,026.27	3.3	19,598,216	12.3
67	Motor Trend	1,026.23	10.1	32,772,887	20.5
68	Four Wheeler	1,008.05	(7.3)	7,569,021	4.9
69	New Woman	1,007.32	(1.7)	23,353,580	9.4
70	House & Garden	990.32	(11.1)	23,466,775	(0.6)
71	Conde Nast Traveler	960.35	52.7	23,404,930	78.0
72	Popular Science	949.26	16.4	26,763,392	22.8
73	Outdoor Life	942.14	1.5	27,702,501	12.2
74	Connoisseur	941.87	(13.1)	14,930,478	6.4
75	Field & Stream	929.91	(3.6)	30,941,583	8.3
76	Popular Mechanics	929.01	(2.4)	28,730,197	7.6
77	Delta Sky	927.08	(2.8)	22,212,455	7.1
78	Black Enterprise	908.81	3.5	11,171,271	7.6
79	Working Mother	869.17	(5.8)	18,056,958	3.9
80	Essence	862.32	(7.0)	19,837,403	0.4
81	Skiing	875.66	0.9	18,466,513	4.3
82	M	866.14	(5.9)	9,871,141	7.1
83	House Beautiful	818.30	(4.4)	27,331,466	4.8
84	Life	810.96	5.3	56,846,163	18.7
85	California	796.96	0.1	10,890,844	4.0
86	Financial World	777.16	0.3	15,585,824	31.5
87	Yankee	770.24	(14.2)	8,857,221	(4.0)
88	Tennis	768.31	(16.3)	17,258,193	3.1
89	Shape Magazine	763.87	(19.1)	11,231,760	(3.4)
90	US	761.48	13.3	22,393,051	34.2
91	Premiere	759.25	28.7	10,960,896	99.4
92	Art & Antiques	754.83	2.3	4,169,151	6.1
93	Basemaster	752.85	(4.5)	12,987,213	1.8
94	Food & Wine	747.06	5.6	17,039,148	19.1
95	Sports Afield	743.67	(14.7)	13,583,803	9.1
96	Playboy	740.48	7.7	46,503,664	14.4
97	Southern Accents	728.46	(4.9)	9,695,340	8.4
98	American Health	725.34	8.5	13,825,238	18.3
99	Omni	716.19	(9.9)	22,039,130	3.7
100	1,001 Home Ideas	699.74	2.5	18,987,709	21.7

Percent change is computed from January through December 1988 pages by PIB.
Source: Publishers Information Bureau

NEWSSTAND

Print advertising opportunities.

Sports Illustrated, New York, "35 years of *Sports Illustrated* covers" special editorial issue, March 28 issue; ad close: Jan. 31. B&w page: $81,600; color page: $120,000.

Prevention, Emmaus, Pa., "Low-cholesterol breakfasts" special editorial feature, April issue; ad close: Feb. 1. B&w page: $29,585; color page: $38,760.

Self, New York, "Foodstyles" special advertising section, May issue; ad close: Feb. 1. B&w page: $29,739; color page: $44,413.

Vogue, New York, "Health and fitness" special editorial feature, April issue; ad close: Feb. 1. B&w page: $29,870; color page: $43,000.

Hispanic, Washington, "Hispanics on campus" special editorial section, March issue; ad close: Feb. 2. B&w page: $5,800; color page: $7,500.

Business Week, New York, "Meetings and conferences" special advertising section, March 19 issue; ad close: Feb. 5. Color page: $34,700.

Fortune, New York, "Business travel management in the '90s" special ad supplement, March 26 issue; ad close: Feb. 5. B&w page: $32,460; color page: $49,660.

Frisko, San Francisco, "The most dangerous women in the Bay area" special editorial feature, spring issue; ad close: Feb. 5. B&w page: $1,205; color page: $3,190.

Philadelphia, Philadelphia, "Commercial real estate in the Philadelphia market" special advertorial section, March issue; ad close: Feb. 6. B&w page: $5,185; color page: $7,690.

The Wall Street Journal, New York, "The census" special editorial issue, March 9 issue; ad close: Feb. 16. B&w page: $55,968. □

CONSUMER MAGAZINE AD LINAGE

	December 1989	December 1988	Year-to-date 1989	Year-to-date 1988
■ Auto/cycle/rec. vehicles				
AutoWeek (52X)	163.4	143.4	1,895.3	1,970.3
Car & Driver C.	117.8	98.5	1,302.3	1,224.5
Car Collector & Car Classics	21.3	20.5	208.3	209.4
Car Craft	54.9	57.6	904.0	965.2
Circle Track	64.7	66.3	1,005.9	950.3
Cycle	34.7	45.0	481.7	505.7
Cycle World	38.3	39.4	497.3	546.8
Dirt Rider	40.0	39.4	389.5	454.8
Dune Buggies & Hot VWs	67.7	70.8	826.3	881.9
Family Motor Coaching	144.1	141.3	2,135.2	2,053.3
4 Wheel & Off-Road	79.7	99.1	1,005.8	1,074.1
Four Wheeler C.	86.6	94.8	1,008.1	1,087.2
Hot Rod C.	63.4	75.6	1,050.7	1,057.3
Motorcyclist	29.2	33.1	468.1	485.5
Motor Trend C.	82.9	85.2	1,026.2	932.0
Motorhome	91.6	96.3	1,115.3	1,121.2
Rider	33.7	29.7	399.6	457.8
Road & Track C.	86.2	101.1	1,223.3	1,178.9
Trailblazer	41.0	56.0	637.0	796.2
Trailer Life	83.6	92.3	1,098.5	1,178.1
Total Group	**1,424.9**	**1,485.3**	**16,678.4**	**19,132.6**
% change	**-4.1%**		**-2.4%**	
■ Boating & yachting				
Boating	97.1	107.8	1,704.9	1,847.5
Chesapeake Bay	29.5	39.5	599.9	612.5
Cruising World	92.0	109.6	1,409.8	1,453.3
Lakeland Boating (11X)	118.0	73.0	991.8	882.9
Motor Boating & Sailing	81.9	119.1	1,581.7	1,814.3
Sail	66.8	85.6	1,300.5	1,295.8
Trailer Boats (11X)	—	—	696.2	664.3
Western Boatman (6X)	—	—	271.8	300.3
Yachting C.	107.4	113.9	1,658.0	1,712.6
Total Group	**595.7**	**648.4**	**10,214.6**	**10,583.4**
% change	**-8.1%**		**-3.5%**	
■ Civic/fraternal				
Elk (10X)	—	—	155.4	171.5
Kiwanis	—	—	144.4	160.1
Lion (10X)	7.0	7.1	77.1	68.7
Rotarian	14.9	24.5	158.9	229.3
V F W (11X)	22.4	21.3	310.7	311.1
Total Group	**44.3**	**52.9**	**846.5**	**940.7**
% change	**-16.3%**		**-10.0%**	
■ General				
American Health (10X) C.	48.0	47.5	725.3	668.3
American Heritage (6X) C.	65.2	35.6	422.7	352.2
American Legion	21.9	23.7	379.8	426.1
American West (6X)	23.3	32.0	173.1	194.0
Art & Antiques (10X) C.	59.9	66.8	754.8	737.8
ARTnews (10X)	101.8	103.8	1,171.0	1,159.1
The Atlantic A. C.	55.4	32.9	618.9	495.7
Bon Appetit A. C.	104.1	105.2	1,053.7	1,058.0
Cable Guide C.	37.8	34.7	449.4	384.8
Changing Times C.	57.8	61.4	627.9	686.2
Conde Nast Traveler C.	87.0	52.8	960.4	628.9
Connoisseur C.	82.7	111.2	941.9	1,083.2
Consumers Digest (6X) C.	—	—	150.3	142.2
Ebony C.	84.0	92.4	1,149.6	1,200.5
European Travel & Life C.	75.2	52.6	581.9	474.4
Food & Wine C.	81.7	97.8	747.1	707.6
Games (6X) C.	20.3	—	117.1	71.8
Golden Years (6X)	—	34.5	267.7	457.6
Gourmet C.	155.3	144.9	1,315.4	1,286.6
Harper's Magazine A. C.	32.2	30.4	362.0	382.9
Harrowsmith (6X)	—	—	342.8	317.2
Islands (6X)	—	—	399.2	301.0
Let's Live	42.0	45.0	567.0	585.0
Life C.	77.3	108.0	811.0	769.9
Modern Maturity (6X) C.	50.5	41.2	256.0	229.5
Money C.	129.7	124.8	1,313.4	1,405.5
Mother Earth News C.	—	—	451.5	439.6
National Geographic C.	18.5	35.4	247.9	259.4
National Geographic Traveler (6X) C.	—	33.5	191.5	144.5
Natural History C.	30.6	23.0	491.3	445.2
New Choices C.	28.5	40.0	425.0	421.7
Prevention C.	39.6	43.5	602.7	660.5
Psychology Today C.	28.3	26.2	351.9	341.8
Reader's Digest A. C.	95.8	136.9	1,110.3	1,220.7
Saturday Evening Post (9X) C.	—	31.6	353.9	315.4
Smithsonian C.	93.1	111.5	1,053.2	1,068.7
Town & Country C.	160.6	168.9	1,665.6	1,684.5
Travel-Holiday C.	18.0	14.6	409.8	378.1
Travel & Leisure C.	148.2	137.5	1,516.2	1,412.8
Travelhost	1,213.0	1,190.0	15,203.0	14,717.0
Vanity Fair C.	160.3	145.6	1,487.4	1,193.2
Yankee C.	55.5	57.4	770.2	897.8
Total Group	**3,681.4**	**3,780.1**	**44,683.6**	**43,688.0**
% change	**-2.6%**		**2.3%**	
■ Home				
Americana (6X)	11.4	16.8	102.8	100.0
Architectural Digest A. C.	137.1	154.2	1,892.3	1,843.1
Better Homes & Gardens C.	115.9	145.9	1,428.7	1,469.4
Colonial Homes (6X) C.	—	—	358.8	368.3
Columbus Monthly-Homes (4X)	—	—	134.1	150.5
Cooking Light C.	36.8	—	348.4	236.8
Country Home (6X) C.	—	—	453.1	362.0
Country Living C.	76.7	89.6	1,106.4	1,120.4
Family Handyman (10X) A. C.	—	—	464.7	471.5
Florida Home & Garden	126.4	99.0	1,007.4	913.2
Flower & Garden (6X) C.	—	—	224.8	261.8
Home C.	39.4	42.3	675.7	728.7
Home Mechanix C.	35.6	35.9	636.4	625.8
Homeowner (10X) C.	24.7	18.0	339.8	329.3
Horticulture	35.0	37.6	450.0	448.8
House Beautiful C.	55.7	50.0	818.3	855.9
House & Garden C.	80.9	84.6	990.3	1,113.3
Metropolis	54.6	62.2	723.7	688.2
Metropolitan Home C.	82.4	76.8	1,220.3	1,060.5
Midwest Living C.	58.8	70.4	383.5	327.7
1,001 Home Ideas C.	48.1	48.0	699.7	682.7
Organic Gardening (11X) C.	33.0	33.9	426.9	520.7
Phoenix Home/Garden	63.3	77.8	887.1	897.3
Practical Homeowner (9X) C.	—	—	312.9	361.3
San Diego Home/Garden	90.5	75.6	877.3	844.1
Southern Accents (6X) C.	67.0	91.9	729.5	766.8
Southern Living C.	85.6	130.8	1,330.0	1,476.7
Sunset Magazine A. C.	108.6	118.8	1,503.3	1,586.3
Workbench (6X)	—	—	277.9	236.7
Total Group	**1,467.4**	**1,560.0**	**20,806.2**	**20,847.9**
% change	**-5.9%**		**-0.2%**	
■ In-flight & other passenger				
Aboard Group (6X)	—	—	253.1	226.8
Alaska Airlines	61.4	55.6	786.0	666.4
America West Airlines	74.8	72.7	849.1	775.2
American Way (24X) C.	130.3	126.0	1,896.7	1,790.4
East/West Network:				
Continental Profiles	55.7	71.0	699.5	646.4
Eastern Review	40.3	71.9	509.1	823.1
Pan Am Clipper	58.7	50.3	671.6	549.4
Southwest Spirit	63.5	74.8	762.4	779.0
TWA Ambassador	48.7	59.3	616.0	592.0
Vis `A Vis	80.1	86.6	1,053.9	815.4
Halsey Publication:				
Delta Sky C.	63.1	74.6	927.1	953.8
Pace Communications:				
US Air Magazine	47.3	52.4	719.7	734.5
Spirit of Aloha	29.6	24.8	299.8	254.6
Total Group	**753.4**	**820.0**	**10,044.0**	**9,807.0**
% change	**-8.1%**		**4.5%**	
■ Men's				
Esquire A. C.	129.6	134.7	1,331.1	1,188.8
Firehouse Magazine	33.3	29.8	500.8	533.4
Gentleman's Quarterly A. C.	207.5	206.7	2,231.0	2,177.6
M Magazine C.	62.7	73.1	866.1	920.0
Muscle & Fitness C.	114.0	136.7	1,506.5	1,558.0
Penthouse A. C.	53.7	51.2	619.7	529.5
Playboy A. C.	67.2	82.1	740.5	687.8
Salute (10X)	33.0	20.0	347.3	288.6
Total Group	**700.9**	**734.3**	**8,143.0**	**7,883.6**
% change	**-4.6%**		**3.3%**	
■ Metropolitan				
Aloha (6X)	—	—	276.2	179.4
Atlanta	82.0	97.8	772.6	884.4
Baltimore	86.6	90.0	836.0	844.4
Boston	147.7	180.1	1,664.8	1,943.6
California C.	102.0	69.8	799.0	798.0
Chicago	144.9	141.6	1,437.7	1,413.6
Chicago's North Shore	94.8	105.5	1,163.8	1,122.9
Cincinnati	92.4	37.8	642.3	595.7
Cleveland	69.6	86.7	677.3	740.0
Columbus Monthly	72.5	67.2	894.7	852.9
Connecticut	86.8	109.4	1,187.2	1,267.1
D/Magazine	85.3	76.5	856.6	970.0
Denver	30.0	46.0	218.0	320.0
Detroit Monthly	89.9	132.7	761.6	1,083.2
Grand Rapids	29.5	39.3	479.0	497.3
Honolulu	67.3	61.1	676.3	734.8
Houston Metropolitan Magazine	52.1	56.9	763.9	693.8
Inside Chicago (8X)	27.0	—	297.5	231.5
Los Angeles	186.2	209.1	1,839.5	1,869.7
Louisiana Life (6X)	—	—	200.0	203.4
Madison	48.0	44.0	502.0	452.0
Memphis	54.0	82.3	864.3	990.6
Mid Atlantic Country	37.5	21.9	516.7	422.9
Milwaukee	70.3	65.2	688.7	691.9
Minneapolis/St. Paul	135.4	115.5	1,359.8	1,286.9
Minnesota Monthly Mag.	75.8	51.0	673.0	507.9
Nashville	58.0	68.0	684.0	560.0
New England Monthly	51.7	64.7	553.7	594.8
New Jersey Monthly	115.0	104.4	1,192.4	1,245.2
New Mexico	44.3	51.7	522.5	483.8
Ohio	28.4	37.7	616.7	675.4
Orlando	80.0	78.0	1,173.0	1,039.0
Pacific Northwest	41.1	40.0	579.0	494.9
Palm Beach Life	97.7	96.0	821.1	785.7
Palm Springs Life	110.2	109.5	1,477.3	1,328.2
Philadelphia	158.2	162.2	1,680.4	1,851.1
Phoenix	52.2	53.6	513.4	608.6
Pittsburgh	75.3	73.3	823.3	844.5
Rhode Island Monthly	70.8	59.9	703.6	393.8
Sacramento Magazine	84.0	87.0	706.0	834.0
St. Louis	59.9	53.6	589.9	513.2
San Diego	183.6	159.5	1,632.3	1,813.6
San Francisco Focus C.	130.7	140.2	1,298.3	1,267.4
Sarasota	77.0	70.0	856.0	766.0
South Florida Magazine	107.9	109.7	1,303.3	1,230.2
Texas Monthly C.	111.9	148.4	1,373.7	1,370.3
Ultra	53.4	60.9	504.3	362.1
The Virginian (6X)	—	—	298.7	305.8
Washington (7X)	—	—	394.8	461.7
The Washingtonian	159.0	167.0	1,935.5	1,886.2
Total Group	**3,917.8**	**3,982.6**	**43,281.4**	**43,313.3**
% change	**-1.6%**		**-0.1%**	
■ Music/entertainment				
Audio	110.8	119.4	1,364.3	1,268.3
Dance Magazine	60.5	60.0	642.6	638.8
Playbill	64.1	67.5	623.1	649.3
Video Magazine	88.8	78.0	808.2	782.0
Total Group	**324.2**	**325.0**	**3,438.2**	**3,338.5**
% change	**-0.2%**		**3.0%**	
■ Outdoor & sport				
Alaska	52.6	45.0	472.6	439.9
The American Handgunner (6X)	—	—	341.0	320.0
American Hunter	14.9	13.8	298.2	287.8
American Rifleman	17.6	12.9	305.5	307.4
Backpacker (6X) C.	—	21.6	229.8	179.3
Bass Master (10X) A. C.	38.9	50.0	752.9	787.9
Bicycling (9X) C.	80.0	81.1	1,101.0	1,114.2
Cross Country Skier	61.8	60.5	275.3	282.5
Ducks Unlimited (6X)	—	—	202.3	200.9
Field & Stream C.	49.7	57.9	929.9	964.7
Fishing World (6X)	—	—	204.7	201.0
Florida Sportsman	101.5	119.4	1,436.5	1,459.1
Golf Digest C.	126.4	115.1	1,333.1	1,265.8
Golf Illustrated C.	44.7	39.5	499.6	394.4
Golf Magazine C.	65.3	59.7	1,159.9	969.6
Gun Dog (6X)	—	—	264.6	193.3
Guns	51.0	48.0	496.0	524.0
Guns & Ammo	44.1	63.7	543.1	647.6
In-Fisherman (7X)	47.4	70.8	479.5	443.1
Outdoor Life C.	52.5	60.0	942.1	928.5
Outside Magazine	63.1	54.8	746.5	676.1
Petersen's Hunting	52.8	65.3	586.9	673.3
Runner's World (12X) C.	29.5	29.8	460.8	440.5
Salt Water Sportsman	64.4	69.3	1,316.5	1,350.1
Shooting Times	28.7	31.2	404.7	449.0
Sierra (6X)	—	—	275.0	252.6
Ski (8X) A. C.	179.2	215.8	1,026.3	993.1
Skiing (7X) A. C.	186.8	162.2	875.7	868.0
Skin Diver C.	111.8	119.2	1,362.2	1,381.6
Southern Outdoors (9X)	—	—	482.1	562.0
Southern Saltwater (8X)	—	—	420.4	312.6
Sport Magazine C.	30.2	35.6	426.7	424.4
Sports Afield C.	44.8	62.1	743.7	871.4
Surfing	60.1	64.9	865.5	808.5
Tennis C.	42.9	48.0	768.3	918.4
Waterski (9X)	—	—	656.1	601.9
Western Outdoors (10X)	—	—	357.2	408.0
Wildfowl (6X)	—	—	132.6	140.3
WindRider (6X)	—	—	396.4	407.7
Wing & Shot (6X)	—	—	96.6	83.8
World Tennis C.	35.0	19.2	533.3	612.6
Total Group	**1,777.5**	**1,898.3**	**25,200.9**	**25,146.9**
% change	**-6.3%**		**0.2%**	
■ Photography				
American Photographer C.	35.6	30.3	382.4	351.0
Petersen's Photographic	35.8	27.8	339.2	328.7
Popular Photography C.	122.2	98.2	1,101.3	972.0
Total Group	**193.6**	**156.4**	**1,822.9**	**1,651.7**
% change	**23.8%**		**10.4%**	
■ Science/electronic/mech				
Discover C.	39.5	31.1	466.8	409.1
Home Office Computing C.	57.1	58.0	557.3	560.3
Omni C.	69.8	86.7	716.2	794.7
Popular Mechanics C.	69.2	82.5	929.0	951.5
Popular Science C.	57.4	70.4	949.3	815.5
Scientific American C.	70.0	39.8	526.2	490.4
Spectrum C.	54.4	60.7	687.8	764.0
Total Group	**417.3**	**429.2**	**4,812.7**	**4,785.5**
% change	**-2.8%**		**0.6%**	
■ Woman/fashion/service				
Beauty Digest (6X)	26.7	17.3	147.0	109.1
Bride's (6X) A. C.	533.6	438.0	3,358.9	2,866.5
Cosmopolitan A. C.	166.5	164.8	2,352.3	2,360.7
Elle C.	229.8	180.1	2,321.5	2,215.1
Essence C.	69.5	68.1	882.3	948.5
Family Circle (17X) A. C.	121.8	164.2	2,018.8	1,856.4
Glamour C.	138.7	149.7	1,959.5	2,055.8
Good Housekeeping A. C.	173.9	160.7	1,702.0	1,620.6
Harper's Bazaar C.	123.2	105.1	1,454.8	1,444.9
Health C.	22.8	22.2	391.7	459.4
Images	180.5	183.9	1,204.7	1,133.2
Ladies' Home Journal C.	146.2	139.1	1,616.2	1,366.1
Mademoiselle C.	114.7	119.0	1,649.5	1,793.9
McCall's C.	86.3	115.1	1,121.2	1,035.5
Military Lifestyle (10X)	—	—	530.4	513.1
Modern Bride (6X) C.	363.9	315.0	2,491.7	2,172.8
New Woman C.	70.8	85.2	1,007.3	1,024.2
Parents Magazine A. C.	157.3	144.5	1,544.0	1,430.5
Redbook C.	121.2	98.9	1,250.8	1,212.9
Savvy C.	40.7	44.5	558.6	545.6
Self C.	101.1	72.6	1,347.9	1,244.4
Seventeen C.	68.8	62.9	1,331.7	1,393.7
Shape C.	51.2	60.8	763.9	944.1
Soap Opera Digest (26X) C.	25.9	23.7	469.3	298.0
Soap Opera Update	11.0	4.0	114.3	114.5
Teen Magazine	31.3	36.9	585.6	632.3
True Story A. C.	49.4	47.4	681.6	611.2
Vogue C.	246.0	247.0	3,321.9	3,330.7
W Magazine C.	75.1	78.1	1,531.0	1,432.7
Weight Watchers C.	28.2	22.5	402.4	390.8
Woman (10X)	36.2	40.0	369.4	427.5
Woman's Day (15X) A. C.	143.3	157.7	1,790.4	1,686.0
Working Mother C.	83.7	102.6	889.2	943.7
Working Woman C.	78.6	77.8	1,128.7	1,132.4
Total Group	**3,917.8**	**3,749.2**	**44,290.2**	**42,746.7**
% change	**4.5%**		**3.6%**	
■ Youth				
Boys' Life C.	32.7	30.2	231.4	215.8
Campus Life (10X)	63.7	53.5	514.9	464.5
Total Group	**96.4**	**83.7**	**746.3**	**680.3**
% change	**15.2%**		**9.7%**	
■ Business/national				
Barron's	153.4	121.9	1,846.5	2,129.8
Black Enterprise C.	69.8	52.9	908.8	878.3
Business Month C.	42.3	41.8	433.7	451.9
Business Week (52X) A. C.	421.8	442.0	4,914.2	4,586.3
Entrepreneur C.	120.4	119.6	1,758.5	1,271.4
Financial World (26X) C.	63.9	68.6	777.2	774.8
Forbes (26X) C.	301.9	281.2	3,905.8	3,458.9
Fortune (26X) C.	309.5	307.4	3,775.0	3,236.8
Frequent Flyer	31.6	42.0	511.1	571.9
Futures	43.5	41.4	533.3	649.6
Inc. Magazine C.	123.0	124.7	1,231.5	1,233.9
Income Opportunities	74.3	81.5	837.7	926.2
Industry Week (23X) A.	54.1	61.6	1,119.6	1,097.2
Nation's Business (12X) A. C.	19.9	31.2	437.5	417.7
Total Group	**1,829.3**	**1,817.8**	**22,990.2**	**21,684.8**
% change	**0.6%**		**6.0%**	
■ Business/regional				
Advantage-Nashville's Bus. Mo.	66.0	84.0	846.0	813.0
Arizona Bus. Gazette (52X)	71.0	73.0	699.1	862.4
Bus. Jrnl.-Milwaukee	97.0	112.7	1,798.0	1,980.0
Bus. Jrnl.-Sacramento	126.5	114.4	1,055.6	1,052.2
Bus. North Carolina	44.5	35.3	498.2	436.0
Capital Dist. Bus. Review (52X)	78.6	80.8	837.3	892.1
Caribbean Business	173.2	126.0	1,596.0	1,365.9
Corporate Rpt. Minnesota	49.4	61.3	783.7	868.0
Crain's Chicago Bus. (52X)	135.0	142.0	1,701.4	1,795.0
Crain's Cleveland Bus. (52X)	79.5	71.6	957.4	890.5
Crain's Detroit Bus. (52X)	113.9	91.3	1,020.2	984.3
Crain's New York Bus. (52X)	53.0	45.0	734.0	621.0
Florida Trend (13X)	31.2	43.8	610.8	717.4
Georgia Trend	20.5	28.8	545.3	634.9
Grand Rapids Bus. Jrnl.	60.9	40.3	581.4	626.8
Hawaii Business	50.5	36.5	635.9	588.7
Houston Bus. Jrnl. (52X)	51.0	96.0	921.0	880.0
Indianapolis Bus. Jrnl. (52X)	149.1	156.1	1,957.0	1,888.2
Manhattan Inc. C.	46.9	61.9	660.1	776.7
New England Bus. (12X) A.	30.2	27.3	454.4	623.1
New Orleans City Bus.	43.6	31.5	522.5	544.0
Pacific Bus. News (52X)	113.7	112.0	1,275.2	1,298.0
Philadelphia Bus. Jrnl.	166.3	167.5	1,803.5	1,843.1
Pittsburgh Bus.Times (52X)	134.1	146.1	520.9	493.9
Providence Bus. News	79.8	83.5	1,082.0	1,030.3
Regardie's/Washington	102.0	131.0	1,916.0	1,752.0
St. Louis Bus. Jrnl. (52X)	99.6	136.2	1,276.7	1,398.3
Warfield Monthly Baltimore	49.8	53.1	725.7	791.0
Total Group	**2,316.6**	**2,369.0**	**28,015.3**	**28,446.6**
% change	**-2.2%**		**-1.5%**	
■ National Sunday mags				
Parade (52X) C.	65.5	43.2	717.9	664.7
USA Weekend (52X) C.	55.1	33.6	643.7	553.4
Vista Magazine (52X)	21.9	23.2	254.1	232.3
Total Group	**142.5**	**100.0**	**1,615.8**	**1,450.4**
% change	**42.6%**		**11.4%**	
■ Newspaper Sunday magazine				
Boston Globe	171.2	156.3	2,478.2	2,486.3
Chicago Tribune	174.4	184.2	1,451.6	1,394.0
Cleveland Plain Dealer	91.5	102.7	862.2	856.9
The Dallas Morning News	66.0	47.0	775.0	778.0
L.A. Times C.	135.7	130.5	1,310.7	1,288.8
Louisville Courier-Jrnl.	54.0	35.0	416.0	455.0
New York Times Mag. C.	348.4	336.2	4,036.0	4,113.8
Philadelphia Inquirer	131.5	103.0	1,106.1	1,170.5
Seattle Times	127.0	88.0	947.0	894.0
St. Louis Post Dispatch	80.6	73.2	1,022.1	961.3
Toledo Blade Magazine	48.8	26.8	446.9	385.7
Washington Post	148.0	124.1	1,607.7	1,643.7
Total Group	**1,577.1**	**1,407.0**	**18,459.5**	**18,428.0**
% change	**12.1%**		**0.2%**	
■ Weeklies/bi-weeklies				
The Advocate (26X)	125.6	151.1	1,698.2	2,001.7
Army Times Military Group:				
Air Force Times (52X)	118.5	130.7	1,900.8	1,943.7
Army Times (52X)	123.8	132.7	1,846.8	1,869.8
Navy Times (52X)	133.2	149.0	2,091.6	2,132.2
Capper's (26X)	14.9	12.8	352.5	272.3
Commonweal (22X) B.	7.8	—	71.9	—
Golf World (40X)	70.2	101.7	1,148.9	1,108.7
Grit (52X) A.	18.3	14.5	403.0	330.5
National Journal (50X) C.	20.0	40.0	676.2	855.5
National Review (25X)	26.1	39.3	306.2	442.3
New Republic (48X)	39.3	34.1	531.7	503.1
New York Mag. (50X) C.	363.9	348.1	3,094.9	3,052.4
New Yorker C.	290.0	245.1	2,409.5	2,292.1
Newsweek (52X) A. C.	212.7	210.5	2,495.3	2,478.7
People (51X) C.	413.4	445.6	3,770.8	3,825.7
Rolling Stone (25X) C.	150.5	196.9	1,964.8	1,847.7
Sporting News (52X) C.	29.9	30.7	586.8	578.8
Sports Illustrated (52X) A. C.	244.5	263.2	2,981.9	2,978.0
Time (52X) A. C.	227.3	210.0	2,733.9	2,505.9
TV Guide (52X) A. C.	253.7	335.5	3,255.1	3,506.6
US Magazine (26X) C.	63.7	80.8	761.5	672.0
U.S. News & World Report (50X) A. C.	205.2	215.9	2,053.2	1,873.1
Total Group	**3,144.7**	**3,388.1**	**37,063.4**	**37,070.7**
% change	**-7.2%**		**0.0%**	

NOTES: (X) represents the number of times published each year; publications are monthly unless otherwise specified. A. Sectional linage included but prorated to circulation of regional editions. B. Incomplete report not included in group total and % change. C. Figures supplied by Publishers Information Bureau. All other figures are supplied by the magazines. *Ad Age* makes no attempt to verify figures and is not responsible for inconsistencies or errors. Compiled by Kathy Welyki.

Kodak issues agency challenge

By Alison Fahey

Eastman Kodak Co.'s new get-tough stance on quality and cost-cutting has been extended to its 28 agencies.

"We issued a challenge to all our agencies, including our sales promotion and public relations" shops, to produce better creative and operate more efficiently, said Richard Bartlett, Kodak's director of marketing communications. "We want more bang for our buck."

Last month, Kodak huddled with executives from all its agencies to issue formal "guidelines and quality standards."

The company last August said it would ask shops to be more cost-effective while announcing a major restructuring (AA, Aug. 28).

Kodak's two lead agencies are J. Walter Thompson USA and Young & Rubicam, both New York.

The marketer talked about more than efficiencies at the December gathering.

"You would be surprised at the wide disparity in photographic quality that finds its way into print," Mr. Bartlett said in remarks prepared for the meeting.

He invited agencies to join a "Quality Partnership" program to explore ways "to enhance the quality of our communications [and] increase the contribution that advertising, sales promotion and public relations make to sales and profits, yours and ours."

"Kodak must get back to basics in copy and concept that's consumer and end-user oriented, not product and technology driven," Mr. Bartlett said at the meeting.

"We're very concerned about the standard of quality in our advertising," he said in a later interview.

JWT, a Kodak agency for 60 years, handles U.S. film advertising; Y&R handles cameras. Rumrill-Hoyt, Rochester, N.Y., is Kodak's agency of record for professional photography products.

R. Bartlett

"We are in no way unhappy with the performance of our major agencies, JWT, Y&R and Rumrill-Hoyt," Mr. Bartlett said in the interview. "We're very proud of results of our partnership. But we do see future opportunities to enhance that partnership."

Agency executives reacted positively to Kodak's move.

"I think they laid out some serious initiatives and are asking the agencies to focus on quality," said David S. Kassnoff, senior account executive at Hutchins/Young & Rubicam, a marketing services shop. "They want us to work more efficiently, and we're going to do that."

"It was a useful exercise. . . . It helps the agencies understand Kodak's evolving beliefs and principles," said Fernan Montero, Y&R's senior VP-worldwide account director on Kodak.

Kodak discussed planned ad cuts at the meeting but didn't disclose details.

Mr. Bartlett told the executives: "The fact of the matter is that some of you will be called upon to do less work for Kodak in 1990 and perhaps even beyond. Simply stated, Kodak must accomplish more with less if we expect to compete successfully in the global marketplace of the '90s."

He said Kodak plans to adjust ad spending throughout the year, and reductions will vary by division.

Kodak in 1988 spent more than $90 million in measured media, reported LNA/Arbitron Multi-Media Service. From January to September 1989, Kodak spent more than $60 million. These figures exclude its Sterling Drug subsidiary. □

AdWatch

(Continued from Page 12)

heard or read in the previous 30 days. Each month, 1,000 people are surveyed by phone. The survey has a margin of error of plus or minus 3.1%.

Among the top three advertisers for the year in each of the categories surveyed monthly:

- Chevrolet placed ahead of Ford in the overall rankings, but when respondents were asked which ad for the **cars and trucks** category they recalled first, Ford won.

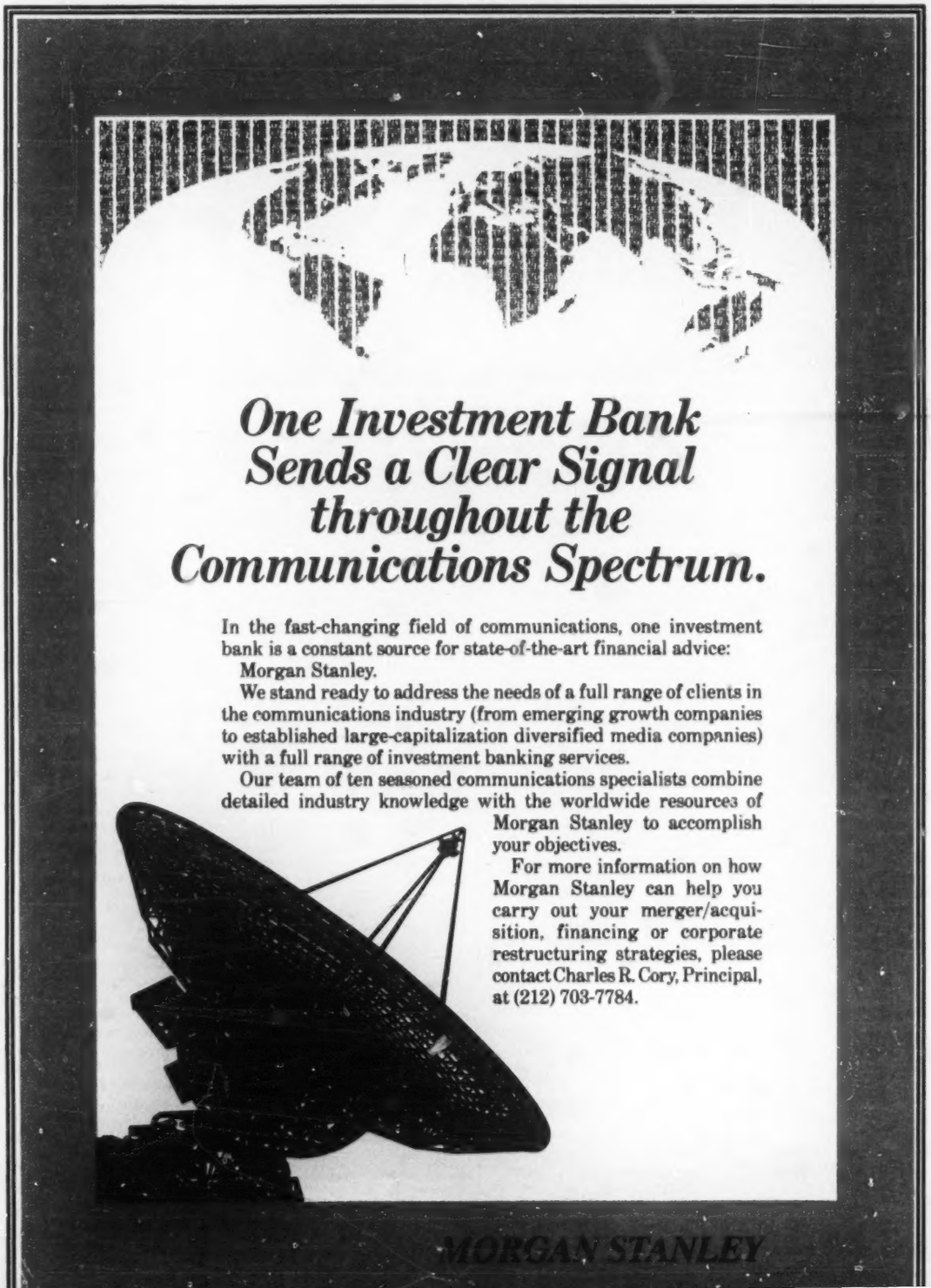
Ford took top honors with an average 24.3% of first mentions, followed by Chevrolet with 19.9% and Toyota with 7.9%.

- The **computer** category wasn't close in 1989. Apple Computer finished with 29.7% of first mentions, easily outdistancing IBM Corp.'s 18.8% share. Radio Shack settled for third with a 2.8% share.
- Once again, McDonald's earns special recognition for dominating ad recall in its category better than any other advertised product. On average, McDonald's ads came to mind first in the **fast-food** category for 48.4% of those sampled.

There's a sharp drop to the No. 2 finisher, Burger King Corp., which averaged 11.4% of first mentions. Wendy's International had 9.9%.

- In the **pet-food** category, the winner was Alpo Petfoods, which averaged 9.7% of first mentions. But Ralston Purina Co.'s Purina name was close behind with an average 9.1%. Quaker Oats Co.'s Kibbles 'n Bits took the No. 3 spot with 4.1%.
- Goodyear Tire & Rubber Co. continued its leadership in the **tire** category, averaging 24.8% of first mentions. Michelin Tire Corp. was second, averaging 19.2%. In the No. 3 spot was Firestone Tire & Rubber Co. with 6.5%. □

For more information, contact the Gallup Organization, 301 S. 68th St., Lincoln, Neb. 68506.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